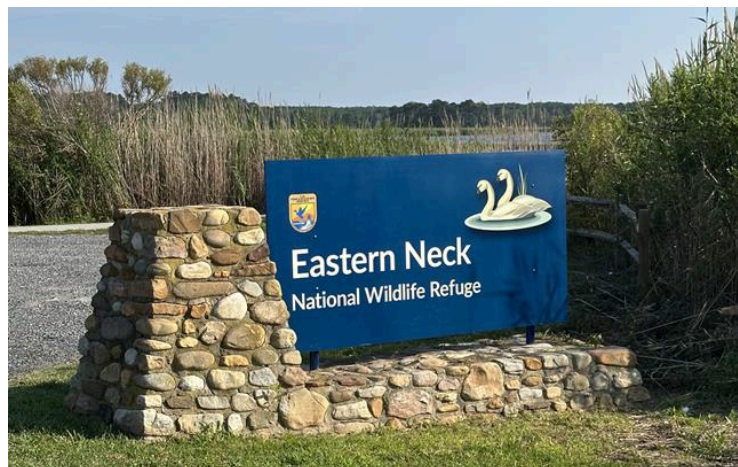




# Eastern Neck National Wildlife Refuge

A strong Kent County, MD economic engine



2025 Economic Impact Analysis prepared for Friends of Eastern Neck.

Brian Scott, Jim Lim Professor of Economics & Co-Chair of the Economics Department, Department of Environmental Science and Studies, Washington College.<sup>1</sup>

---

<sup>1</sup> Special thank-you to Andrea Boothby Rice, the Washington College Research and Instruction Librarian

# Support for continued funding of Eastern Neck National Wildlife Refuge

## ***Executive Summary:***

*Eastern Neck National Wildlife Refuge (ENWR) provides indispensable economic, ecological, and social benefits to Kent County, Maryland. Continued funding and maintenance of the ENWR supports the mission and vision statements of the U.S. Fish & Wildlife Service. It bolsters the local economy, ensuring a vital \$1 million or more in annual visitor income flows into the local economy, providing a consistent, year-round revenue stream. This is especially crucial during the off-season, when it boosts local businesses as other industries are dormant. Organizations such as Friends of Eastern Neck, Kent County, and others partner together to leverage funding and provide value to the community, highlighting responsible stewardship of the public's tax dollars. Additionally it preserves invaluable cultural assets, safeguards a critical, thriving ecosystem, and enhances public safety. In short, an investment in ENWR is an investment in Kent county and the surrounding economy.*

## Economic Impact of the Eastern Neck National Wildlife Refuge

The purpose of this document is to quantify, wherever possible, the financial value which the Eastern Neck National Wildlife Refuge provides the local Kent County, MD community. This document adds value to the conversation of any refuge-related Federal budget decisions, fostering continued support for valuable resources like the ENWR. Although this paper focuses on ENWR, our intention is that it will shed light on the economic value of the National Wildlife Refuge System as a whole and build support for maintaining a viable level of national funding for the US Fish & Wildlife Service (FWS), which maintains the National Wildlife Refuge System.

Although the main tenet of the mission of the refuge system is to protect wildlife, Kent County receives tangible benefits in the form of incidental spending. Visitors come to ENWR year-round for many purposes including:

- Fishing
- Photography
- Hiking
- Bird watching
- Bicycling
- Hunting
- Kayaking
- Youth and adult community and education programming

Studies cited below show that the value of visitor spending amounts to an estimated \$1 million per year. The town of Rock Hall likely garners the bulk of this spending . Refuge visitors must pass through Rock Hall, and it is the only nearby source of restaurants, groceries, fuel and other supplies and services. The town of Chestertown, and the larger Kent County area, is also a beneficiary, being on the main route to the refuge and providing a wider range of goods and services. The timing of visitor spending is almost as important as the quantity, since Rock Hall's boating-oriented economy is highly seasonal. The activities listed above bring visitors, and visitor dollars, to the area year-round, especially during the off-season, when the charter fishing boating industry is dormant and the seafood industry is in transition.

## The Importance of The Eastern Neck National Wildlife Refuge

The ENWR is a vibrant ecosystem supporting tens of thousands of waterfowl, hundreds of bird species, active and productive fishing habitat, a butterfly sanctuary, and areas of historic and cultural significance, including the refuge's museum, a repurposed hunting lodge. For thousands of years there has been hunting on these grounds, which continue today with regulated whitetail deer hunting, and the youth turkey hunt<sup>2</sup>. The biological, ecological, historical, and cultural significance is undeniable. The impact on the local economy, both the local communities and the hunting industry, is quite large.

Each year, the refuge welcomes tens of thousands of visitors from the local area and beyond<sup>3</sup>. And with them comes hundreds of thousands, even millions, of visitor dollars spent on the local

---

<sup>2</sup> U. S. Fish & Wildlife Service, Eastern Neck Wildlife Refuge, <https://www.fws.gov/refuge/eastern-neck/about-us>, accessed August 25, 2025

<sup>3</sup> EN Bridge TRAFx+Master+Summary+(2018-2023), Personal Communication Marcia Pradines Long, Complex Leader, Chesapeake Marshlands, National Wildlife Refuge Complex, January 6, 2024

communities<sup>4,5,6,7</sup>. Visitors spend money on lodging, food, transportation, retail, equipment (hunting, fishing, photography) and other items. The refuge is also an input to another regional economic driver - supplying food, shelter, and breeding grounds for waterfowl. The upkeep and maintenance of ENWR is vital for waterfowl migration, supporting the large waterfowl hunting industry.

## Impacts of Visitor spending on the local communities

### ENWR Visitor Spending Impact

Documents produced by the US Fish and Wildlife Service indicate spending by visitors in any given year range from \$693,600 to \$2,685,400<sup>8,9</sup>. The latest report in 2017 indicated spending of \$822,600<sup>10</sup>. A survey conducted by The Ohio State University in 2023 supports these numbers, by noting the average resident (local) visitor spends \$71, while the non-resident spends \$100 on each visit to the refuge. Though a total spending number was not given for 2023, Table 1 in the appendix indicates that the 2023 spending per person meets or exceeds the previous reports. Table 2, following, shows the visitation rates over time, with 2024 visitations increasing to 83,795. Pairing these two tables indicates the 2023 and 2024 (and presumably 2025) visitor spending in the local communities is within the range given above, or close to \$1,000,000.

The 2006 Banking On Nature document<sup>11</sup> reports that the final demand for visitor activities (the economic activity generated by visitors) equaled \$3,800,000, which created 44 local jobs, with total job income of almost \$1,200,000. There was nearly \$600,000 in tax revenue generated from ENWR activities. It also reported that for each dollar of budgeted expenditures on the ENWR, the local economy was boosted by \$6.35, and total economic value (including the value of happiness of using the resource) was \$11.35.

---

<sup>4</sup> Caudill, James and Erin Carver. 2013. Banking on Nature: The Economic Benefits to Local Communities of National Wildlife Refuge Visitation. U.S. Fish and Wildlife Service, Washington, DC

<sup>5</sup> Caudill, James and Erin Carver. 2019. Banking on Nature 2017: The Economic Contributions of National Wildlife Refuge Recreational Visitation to Local Communities. U.S. Fish and Wildlife Service, Falls Church, Virginia.

<sup>6</sup> Carver, Erin, and James Caudill. 2007. Banking on Nature 2006: The Economic Benefits to Local Communities of National Wildlife Refuge Visitation. U.S. Fish and Wildlife Service, Washington, DC

<sup>7</sup> National Wildlife Refuge Visitor Survey: 2023 Results for Eastern Neck National Wildlife Refuge, Dietsch, A. M., Sexton, N. R., & Gutierrez, E. (2024), Columbus, OH: The Ohio State University, School of Environment and Natural Resources

<sup>8</sup> Caudill, James and Erin Carver. 2013. Banking on Nature: The Economic Benefits to Local Communities of National Wildlife Refuge Visitation. U.S. Fish and Wildlife Service, Washington, DC

<sup>9</sup> Caudill, James and Erin Carver. 2019. Banking on Nature 2017: The Economic Contributions of National Wildlife Refuge Recreational Visitation to Local Communities. U.S. Fish and Wildlife Service, Falls Church, Virginia.

<sup>10</sup> Carver, Erin, and James Caudill. 2007. Banking on Nature 2006: The Economic Benefits to Local Communities of National Wildlife Refuge Visitation. U.S. Fish and Wildlife Service, Washington, DC

<sup>11</sup> Carver, Erin, and James Caudill. 2007. Banking on Nature 2006: The Economic Benefits to Local Communities of National Wildlife Refuge Visitation. U.S. Fish and Wildlife Service, Washington, DC

In the 2011 Banking On Nature<sup>12</sup> report the final demand for visitor activities was \$929,900, which was associated with 9 local jobs, and job income of \$287,100. There was nearly \$139,000 in tax revenue generated from ENWR activities. For each \$1 of budgeted expenditures on the ENWR, the local economy was boosted by \$2.45, and total economic value (including the estimated value of happiness of using the resource) was \$5.69.

The 2017<sup>13</sup> report the total economic output was \$822,600, similar to 2011. Total employment income was \$250,300, supporting 9 local jobs.

In summary, given historical figures, the economic activity generated by visitors on a yearly basis is likely \$1,000,000 or more, supporting 9 local jobs, injecting \$250,000 or more in employment income in the community. It is probable that well over \$100,000 in tax revenue will be generated from ENWR activities this year alone. As can be seen below, this has a large impact on the small communities which surround the refuge. What isn't captured in these numbers is the infusion of much needed spending in the winter when charter boat fishing is out of season, and the fishing industry transitions between species.

## Local Communities

The towns of Rock Hall and Chestertown are the two most likely areas visitors spend their dollars. Rock Hall is the gateway as the only entrance to the ENWR. State Highway 20 is the main 13 mile highway connecting Chestertown to Rock Hall. There are other roads to Rock Hall, but minus a few local areas, the most direct route to Rock Hall from anywhere else is through Chestertown. Both towns offer lodging, food, transportation, and retail, and are located in Kent County.

### Rock Hall

A Lightcast City Overview<sup>14</sup> reported in 2024 total employment was 356, and the median salary was \$48,800. The top three industries are Other Amusement and Recreation Industries, Restaurants and Other Eating Places, and Grocery Stores, while the "Largest industries" were Arts, Entertainment, and Recreation, and Accommodation and Food service. Arts, Entertainment, and Recreation was the top growing industry, top industry employment concentration, third in top industry earnings. Finally, as a yardstick, the town of Rock Hall FY 2024 municipal budget revenue was \$1,627,846<sup>15</sup>.

It is likely a good portion of the ENWR visitor spending is coming to Rock Hall. When comparing the reports above, some of the 9 - 44 local jobs created by tourist visits, the roughly

---

<sup>12</sup> Caudill, James and Erin Carver. 2013. Banking on Nature: The Economic Benefits to Local Communities of National Wildlife Refuge Visitation. U.S. Fish and Wildlife Service, Washington, DC

<sup>13</sup> Caudill, James and Erin Carver. 2019. Banking on Nature 2017: The Economic Contributions of National Wildlife Refuge Recreational Visitation to Local Communities. U.S. Fish and Wildlife Service, Falls Church, Virginia.

<sup>14</sup> Lightcast City Overview

<sup>15</sup> [https://www.rockhallmd.com/sites/g/files/vyhlf3736f/pages/fy24\\_budget.pdf](https://www.rockhallmd.com/sites/g/files/vyhlf3736f/pages/fy24_budget.pdf), accessed August 25, 2025

\$1,000,000 in visitor spending, and the \$100,000+ in tax revenue would have a large impact on the 356 jobs and \$1,627,846 budget of this town of nearly 1,200 people.

## Chestertown

Similarly, a Lightcast City Overview<sup>16</sup> report on Chestertown revealed in 2024 total employment was 4,614 , and the median salary was \$63,800. The top three industries are Colleges, Universities, and Professional Schools, Restaurants and Other Eating Places, and Grocery Stores. Finally, as a yardstick, the town of Chestertown FY 2024 municipal budget revenue was \$5,035,180<sup>17</sup>.

As a note, a Lightcast Economy Overview report indicated Kent County's top growing industry was Arts, Entertainment, and Recreation<sup>18</sup>. Kent County visitor spending in 2023 was \$72,000,000, and visits to Kent County equalled 328,900, supporting 426 jobs<sup>19</sup>.

Visitors and dollars from ENWR likely impact Rock Hall more than Chestertown, due to proximity and size of economy. The impact of ENWR visitor spending on these small local communities is non-negligible. Particularly when considering the influx of revenue during the off-season.

## Strong community partnerships

ENWR is an example of exemplary stewardship of public funds and collaboration with the local community, supporting the stated vision of the FWS. Since 2019 FWS has successfully completed several vital visitor-oriented projects at the Eastern Neck National Wildlife Refuge, investing more than \$600,000 of federal funding. FWS funded improvements include a complete rebuild of both the popular Tubby Cove boardwalk and Tundra Swan fishing pier thanks to the bi-partisan supported Great American Outdoors Act. Federal funding also supported roadwork upgrades, new signage, and a new HVAC system in the historic Lodge. This is in addition to the ongoing annual maintenance activities like mowing and building upkeep as well as managing invasive species and habitat management conducted by staff of the Chesapeake Marshlands National Wildlife Refuge Complex, stationed at Blackwater National Wildlife Refuge.

Partners are critical to enhancing the refuge for visitors and leveraging funding where possible. For instance Kent County manages Bogles Wharf and the Ingleside Recreational Area as well as the main road onto the island. Dedicated volunteers and the Friends of Eastern Neck (FOEN) group assist FWS staff with tasks such as mowing, staffing the Lodge's front desk,

---

<sup>16</sup> Lightcast City Overview

<sup>17</sup> <https://www.chestertown.gov/media/8421>, accessed August 25, 2025

<sup>18</sup> Lightcast (Kent) Economy Overview 2025

<sup>19</sup> Economic Impact of Tourism in Maryland 2023, produced by Tourism Economics, an Oxford Economics Company. This report was prepared by Jamie Williams, CEcD, Director, [Economic and Tourism Development](#), Kent County, Maryland.

maintaining trails, assisting in updating the signage, and offering cultural and nature programs. In 2024 57 dedicated FWS volunteers contributed nearly 3,000 hours to these essential tasks. In addition, FOEN were able to provide emergency, short-term, funding support for materials for staff and volunteers to use to keep Tubby Cove's boardwalk open before the Great American Outdoors Act National Team was able to complete the renovation in 2023. The Friends also donated over \$36,000, which was then matched by a \$25,000 Bartus Trew grant, to refurbish the windows of the historic 1930 lodge. The lodge also serves as the FOEN nature shop, with all proceeds directly supporting the refuge's important work.

## Conclusion

The Eastern Neck National Wildlife Refuge provides indispensable economic and ecological benefits to Kent County, Maryland. This analysis demonstrates that ENWR is not merely a valuable ecological community but also a vital economic engine, injecting approximately \$1 million or more annually into local communities like Rock Hall and Chestertown. It is estimated that this visitor spending sustains at least 9 local jobs, contributes over \$250,000 in employment income, and generates upwards of \$100,000 in tax revenue. Crucially, it provides a consistent, year-round economic lifeline, counteracting the seasonal fluctuations often experienced by the region's traditional industries. With its partnerships and multiple funding sources, ENWR is a prime example of a refuge fulfilling the mission and vision of the U.S. Fish & Wildlife Service, and a strong steward of their public funding.

Beyond direct financial contributions, the ENWR underpins critical ecological services, supporting tens of thousands of migratory waterfowl and diverse wildlife, which in turn sustain a significant regional hunting industry. The refuge also safeguards areas of considerable biological, ecological, historical, and cultural importance, exemplified by its historic lodge and educational programs.

In essence, the financial, environmental, and social capital generated by a well-maintained ENWR is a substantial asset for Kent County and the National Wildlife Refuge System at large. Continued, viable funding for the U.S. Fish and Wildlife Service, and specifically for the Eastern Neck National Wildlife Refuge, is not just an investment in conservation but a direct investment in the economic well-being and ecological health of the local community.

# Appendix

Table 1 - Average spending per person, and total spending overall

Year	Average Spending Per person Overall	Average Per person Resident Spending	Average Per person Non-Resident Spending	Total Spending
2006	\$25.83	\$5.02	\$40.38	\$2,685,400
2011	\$7.61	\$5.01	\$16.43	\$693,600
2017	\$10.02	-	-	\$822,600
2023	\$89.00	\$71.00	\$100.00	*

2006, 2011, 2017, Banking on Nature documents, and Dietsch, A. M., Sexton, N. R., & Gutierrez, E. (2024). National Wildlife Refuge Visitor Survey: 2023 Results for Eastern Neck National Wildlife Refuge. Columbus, OH: The Ohio State University, School of Environment and Natural Resources.

Table 2 - Visitations Per Year

Year	Number of Visits	Document
2006	103,946	Banking On Nature
2011	92,150	Banking On Nature
2017	82,095	Banking On Nature
2018	81,905	National Wildlife Refuge Complex
2019	80,340	National Wildlife Refuge Complex
2020	104,289	National Wildlife Refuge Complex
2021	89,193	National Wildlife Refuge Complex
2022	78,131	National Wildlife Refuge Complex
2023	73,188	National Wildlife Refuge Complex
2024	83,795	National Wildlife Refuge Complex

Visitation tables, From EN Bridge TRAFx+Master+Summary+(2018-2024), from Marcia Pradines Long, Complex Leader, Chesapeake Marshlands, National Wildlife Refuge Complex, and 2006, 2011, 2017, Banking On Nature documents